

**ASSESSMENT OF THE REGIONAL IMPACTS ASSOCIATED  
WITH THE CONSOLIDATION OF  
FORT SUMTER DEPARTURE POINTS**

Final Report

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## **PREFACE**

This report was prepared by Industrial Economics, Incorporated (IEc) for John Tucker, Superintendent of Fort Sumter National Monument, U.S. National Park Service (NPS). We would like to thank the following people for their contributions and help: NPS rangers at Fort Sumter; Fort Sumter Tours/Spirit Line Cruises, Inc.; Professor Mark Hartley and his students at the College of Charleston; Annabel Rimmer and staff, S.C. Aquarium; MG Group Concessions; and Sarah Malloy, Benjamin Sigman, and Kirk Klausmeyer of IEc.

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## **EXECUTIVE SUMMARY**

The National Park Service (NPS) asked Industrial Economics, Inc. (IEc) to assess the economic impacts to the Charleston S.C. region that may result from changes in Fort Sumter tour boat operations. Currently, visitors to the Fort depart from one of two locations, the City Marina in Charleston, or Patriots Point in Mount Pleasant, S.C. Beginning in the Summer of 2001, all departures will take place from a pier located adjacent to the new Fort Sumter Visitor's Center near the Aquarium in downtown Charleston.

Specifically, the NPS asked IEC to consider:

- How visitation to the Fort will change given the new departure location;
- Whether Fort visitors would benefit from the option to spend more time at the Fort;
- Whether Fort visitors would take advantage of a proposed water taxi service from Mount Pleasant to downtown Charleston;
- The financial impact on Patriots Point of the change in the departure point to Fort Sumter; and
- The expected impact on Mount Pleasant's economy from a change in the Fort Sumter departure point.

To complete this assignment, IEC developed and administered three surveys of Charleston area visitors and residents. The results of these surveys define current patterns in visitation and the potential changes that will result after the new Fort Sumter Visitors Center opens next year.

### **The New Visitor's Center will significantly increase visitation to the Fort.**

- The new Fort Sumter Visitors Center will have greater exposure to Charleston area visitors, resulting in a significant increase in visitation to the Fort. This gain in visitation will more than offset the loss in visitors who prefer the current departure options. Specifically:

The S.C. Aquarium is projected to attract between 500,000 and 700,000 visitors this year. Had the new Fort Sumter Visitors Center been open, we estimate that *at least* eight to 10 percent of Aquarium visitors would have visited the Fort. This would lead to an increase in Fort visitation of about 36,500 to 45,600 visits per year.<sup>1</sup> Note that these are visitors *who had not planned to visit the Fort given the current departure points*.

Only nine percent of current Fort Sumter visitors (or approximately 20,600 visitors) would *not* have visited the Fort had the new departure site at the S.C. Aquarium been the only available access point.

Thus, the overall net effect (i.e., gains and losses) of offering single departure point from the new Visitors Center in Charleston is that the Fort will be able to serve *at least* seven to 10 percent more visitors. This represents 15,900 to 25,000 visitors per year on top of the current visitation of approximately 240,000 per year.

The Fort would also serve approximately 29,000 additional visitors per year who are interested in seeing the Visitors Center but do not have the time to visit the Fort.

- The estimate of visitation gain that the Fort will experience is conservative (i.e., more likely to understate the gain in visitation than overstate it) for several reasons. The estimate does not reflect Aquarium visitors who expressed interest in going to the Fort, but not exploring the Visitors Center. In addition, a significant number of visitors who did not plan to visit the Fort expressed interest going to the Visitors Center, but not riding the boat to the Fort. It is unknown what percent of these tourists would opt to go to the Fort in response to the Visitors Center. Lastly, the estimate only reflects visitation decisions among Charleston area tourists who are staying overnight for at least two nights

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<sup>1</sup> The estimated increase in Fort visitation is based on a series of conservative conditions. It is premised on the eight to ten percent of S.C. Aquarium visitors who indicated that they did not have plans to visit Fort Sumter. However, had the new site been open, they would have gone to the new Fort Sumter Visitor Center and rode a boat to the Fort. For more details, see the section titled, Defining Future Trends in Fort Sumter Visitation.

**Visitors want to spend more time at the Fort. The new departure point will provide visitors with increased flexibility in the length of their stay.**

- One-third of Fort visitors, or nearly 75,000 visitors, would prefer to have more time at the Fort, with the majority of these individuals preferring at least an additional half-hour. Through consolidation of the departure points, Fort visitors will have a variety of return departure options, allowing for shorter or longer stays at the Fort.

**One-Third of Fort Sumter and S.C. Aquarium visitors would use a Water Taxi between Mt. Pleasant and Charleston**

- Among both Fort Sumter visitors and S.C. aquarium visitors, approximately one-third would “definitely” use or “most likely” use a taxi service that ran between Mt. Pleasant and downtown Charleston. Willingness to use a water taxi service is only slightly higher among visitors staying in Mt. Pleasant when compared to those staying in downtown Charleston.

**Patriots Point will experience some loss in gross revenues, but this loss could be significantly offset given water taxi service from Charleston to Patriots Point**

- Our research indicates that Patriots Point may see a reduction of between two and twelve percent of its annual gross revenues when the departure point for Fort Sumter moves to downtown Charleston. Note that this is a change in total revenues, not net income to this operation.
- This revenue loss is nearly all related to a change in incidental food and gift sales by area tourists who are at Patriots Point primarily because of the Fort Sumter departure point. Only 31 percent of Fort Sumter visitors also went to the Maritime Museum on their trip to Patriots Point. The majority of Fort visitors chose to combine Fort visit with a Charleston area attraction other than the Maritime Museum on that day.
- This revenue loss could be significantly offset by offering a water taxi service that operated between Patriots Point and the Fort Sumter Visitor Center. The tourist traffic due to a water taxi would increase Patriots Point’s visibility to Charleston area visitors who did not plan on visiting the Yorktown.

**We expect little additional impact on Mount Pleasant's economy as a result of the change in Fort Sumter departure point.**

- We considered the extent to which Charleston area visitors would change their lodging location given the change in the departure point to Fort Sumter.
- We surveyed current Fort Sumter visitors about the factors driving lodging choice (i.e., lodging attributes such as cost, location, and proximity to attractions). We also surveyed S.C. Aquarium visitors, who represent the a new source of Fort Sumter visitors, about their lodging choice.
- We found no difference in the lodging choice of visitors to the S.C. Aquarium who did not plan to visit Fort Sumter and visitors to Fort Sumter.
- Lodging choice by Charleston area visitors is driven by the cost of the room and the ease of getting to a *variety* of attractions in the Charleston area.
- Consequently, little evidence suggests that Charleston area visitors will alter their choice of lodging location based upon Fort Sumter's new departure site. Mount Pleasant should experience little, if any, change in hotel revenues (and hotel spin-off revenues) due to the new Fort Sumter departure site.



## PROBLEM DESCRIPTION

Under the current commercial services contract, the National Park Service (NPS) has a commercial concessionaire operating tour boats to Fort Sumter National Monument (FOSU) from two points, Patriots Point in Mount Pleasant and City Marina in Charleston. In August of 2001, the National Park Service plans to open a Visitors Center on peninsular Charleston (next to the South Carolina Aquarium). The Visitors Center will serve as an interpretive center and the sole departure point for accessing Fort Sumter.<sup>2</sup> Consolidating departure points to a single site will allow the NPS greater control over visitors' interpretive experiences and provide visitors with greater flexibility in the amount of time they spend at the Fort.

Representatives of Patriots Point and Mt. Pleasant have expressed concerns about consolidating and relocating tour boat departures. They feel that the NPS plan will lead to adverse effects on the Mt. Pleasant economy (e.g., through decline in Patriots Point revenues, lodging revenues, and employment by local Mt. Pleasant businesses). They also suggest that Fort Sumter may experience a decline in visitation.

In response to these concerns expressed by Patriots Point and Mt. Pleasant, the NPS asked Industrial Economics, Incorporated (IEC) to assess the economic impacts to the Charleston region that may result from changes in commercial operations and consolidation of tour boat departures at the new Visitors Center. Specifically, the NPS asked IEC to:

- *Define baseline trends for the Charleston regional economy.* NPS asked IEC to estimate the current level of visitation, the distribution of non-local visitors, and distribution of planned and unplanned visits. In addition, defining baseline trends includes identifying the general Charleston-area activities and the lodging preferences of Fort visitors.
- *Define future visitation trends in Charleston.* Defining future trends involves assessing changes in the tastes and preferences of Fort visitors after the new FOSU site is open (e.g., lodging choice, flexibility of time at the Fort, etc.).
- *Analyze regional economic impacts.* Analyzing regional economic impacts involves assessing the net change in visitation at the Fort and possible changes in lodging choice due to relocating the Fort's departure points.

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<sup>2</sup> It is, and will remain, possible to visit Fort Sumter by private boat, but very few visitors choose this option.

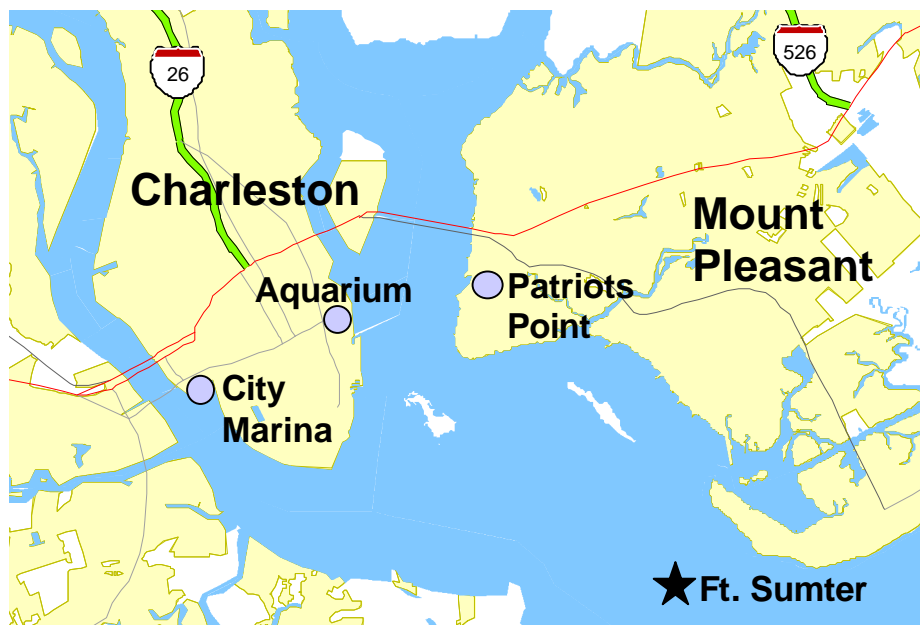
## SURVEY METHODOLOGY

In response to the tasks, IEC developed three survey instruments that were administered in the Charleston area. They are:

- *Survey of Fort Sumter Visitors.* Survey of current Fort Sumter visitors departing from the City Marina (in Charleston) and Patriots Point (in Mount Pleasant).
- *Survey of Charleston Area Visitors.* Survey of Charleston area visitors conducted at the S.C. Aquarium which is located next to the new Fort Sumter departure point.
- *Survey of Charleston Area Residents.* Survey of Charleston area residents conducted at the S.C. Aquarium which is located next to the new Fort Sumter departure point.

The map below, Exhibit 1, shows the location of the surveys that were administered in the Charleston area.

**Exhibit 1**



The Fort survey establishes a baseline from which one can measure the potential impacts of consolidating boat departure points. The survey models the preferences and activities of Charleston-area tourists who visit Fort Sumter. IEC administered the surveys of Charleston-area visitors and residents to S.C. Aquarium visitors. Many of the questions regarding general activities in the Charleston area and lodging choice parallel those asked in the *Survey of Fort Sumter Visitors*. The surveys model preferences and activities of those visitors the Fort will gain by opening a Visitors Center and offering a departure point from the new site.

The instruments are self-administered, intercept surveys that were developed with input from FOSU Superintendent, John Tucker. For the *Survey of Fort Sumter Visitors*, Professor Mark Hartley from the College of Charleston also provided comments and input.<sup>3</sup> IEC administered the survey with the help of his students. Annabel Rimmer, Director of Guest Services, S.C. Aquarium provided input on the other two surveys. IEC administered these surveys, *Survey of Charleston Area Visitors* and the *Survey of Charleston Area Residents*, in front of the S.C. Aquarium, which is next to the future FOSU site.

For the three surveys, respondents were screened to ensure that they were at least 21 years of age and to determine if they were residents of the Charleston area. Survey respondents made the residency determination. If a respondent wanted some more guidance, they were asked if the trip to Charleston was a day trip. Ideally responses should reflect only one adult from each visiting party. This was possible with the Aquarium visitors, but not with the Fort visitors. At the Fort, parties tended to separate and rejoin once on the boat. This group dynamic made it difficult to determine which adults were part of the same party. As a result, surveyors intercepted all adults as they returned to the boat.<sup>4</sup>

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<sup>3</sup> Professor Hartley was a consultant to the Patriots Point Development Authority and was involved in preparing a 12/9/99 position paper regarding FOSU's plans to consolidate departure points.

<sup>4</sup> Intercepting more than one adult in a party will have some affect on the survey results. For example, calculating the distribution of visitors by lodging location or estimating the average number of people in a party will be slightly skewed (specifically, larger groups of adults will tend to be over-sampled in the Fort survey). However, results should not be seriously affected by surveying more than one adult in each party.

## DEFINING BASELINE TRENDS IN FORT SUMTER VISITATION

Establishing a baseline from which one can measure the potential impacts of consolidating boat departure points involves understanding how current Charleston-area visitors behave. Specifically, the baseline assesses Charleston area activities and lodging preferences of Fort Sumter and S.C. Aquarium visitors. These two groups of tourists will be the most directly affected by the new commercial services plan.

### **Survey of Fort Sumter Visitors**

IEc administered the *Survey of Fort Sumter Visitors* for three days during June (June 24 to June 26, 2000).<sup>5</sup> During the three days, surveyors intercepted visitors on all boats leaving from both Patriots Point and the Charleston City Marina. Fort visitors were generally very receptive to taking the survey. Surveyors intercepted visitors as they left the Fort and began to board the boat. They asked the screening questions and gave visitors the survey to complete during the ride back to Patriots Point or the City Marina.<sup>6</sup> IEc opted for this intercept strategy for several reasons. First, this approach minimized the survey's interference with the visitors' experience. Second, it was the most cost-effective (e.g., did not require offering an incentive, reduced time to complete the survey).

IEc collected 583 surveys at the Fort. Fort visitors departing from Patriots Point completed 53 percent of the surveys, and visitors departing from the City Marina completed 47 percent of the surveys. This distribution by departure point is consistent with distribution in actual Fort visitation. Table 1 summarizes the number of collected surveys by departure points.

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<sup>5</sup> IEc conducted a pretest of the survey on June 22 and June 23, 2000.

<sup>6</sup> IEc developed a survey of Fort Sumter visitors that are residents of the Charleston area. The portion of residents among Fort visitors was very low. During the three days of surveying, we intercepted less than 50 residents and collecting only 30 resident surveys. The results of the resident survey are not reported due to the small sample size.

<b>Table 1: Survey of Fort Sumter Visitors: Number of Observations by Boat Departure Time and Date</b>			
<b>Fort Sumter Boat Schedule</b>	<b>Saturday, 6/24/2000</b>	<b>Sunday, 6/25/2000</b>	<b>Monday, 6/26/2000</b>
<i>Patriots Point</i>			
10:45a	34	46	38
1:30p	38	47	30
4:00p	38	17	20
Patriots Point Total	110	110	88
<i>City Marina</i>			
9:30a	36	20	34
Noon	31	26	27
2:30p	40	28	31
City Marina Total	107	74	92
<b>Total<sup>1</sup></b>	<b>218</b>	<b>184</b>	<b>180</b>
<sup>1</sup> One survey from Patriots Point and one from City Marina do not have dates recorded. As a result, there are 309 surveys from Patriots Point and 274 from the City Marina.			

## Demographic Profiles of Fort Sumter Visitors

Fort Sumter visitors are predominantly white/Caucasian. Approximately seven percent of the surveyed visitors are minorities. The average age of is between 35 and 49. Individuals 50 years of age and older represent 35 percent of the respondents, while only 18 percent are between the ages of 21 and 34. The majority of respondents have at least some college education or a degree from a technical or trade school and work full-time. Retired individuals represent 13 percent of the surveyed population. The average household has three members, and the median household income is between \$50,000 and \$75,000. (See Table A-1 in the appendix for more detail.)

Roughly 92 percent of adult Fort visitors are not residents of the Charleston area, with 87 percent living outside of South Carolina. The highest concentration of out-of-state visitors are from North Carolina and Georgia (approximately 13 percent and 9.7 percent, respectively). The distribution of visitors by state is summarized in Table A-2 in the appendix.

## Fort Sumter as a Major Destination

Based on survey responses (of both Fort Sumter visitors and S.C. Aquarium visitors), Fort Sumter is considered a major destination; visitors often plan their trip to the Fort prior to arriving in the Charleston area. In addition to the Fort, the five main attractions were: (i) Charleston Historic District, (ii) City Market, (iii) Patriots Point/Navel Museum, (iv) area beaches, and (v) Waterfront Park. (For more detail, see Table A-3, in the appendix.) The 63.5 percent of Fort visitors consider the Fort Sumter a “primary” destination or “one of a few major” destinations. Another 24 percent considered the Fort “one of many major” destinations. Less than 13 percent identified their trip to Fort Sumter as unplanned. The most frequently cited reasons for visiting the Fort is related to its historical significance and educational aspects. (Table 2 summarizes the respondents’ reasons for visiting the Fort.) In general, nearly all Fort Sumter visitors found their Fort experience educational and enjoyable. (98 percent of the respondents felt the trip was educational. Over 90 percent of the respondents enjoyed the trip “a great deal” or “a lot.”)

**Table 2: Primary Reasons for Visiting Fort Sumter<sup>1</sup>**

Reason	Patriots Point	City Marina	Percent of Total <sup>2</sup>
See historic objects	138	184	77%
Learn about American history &/or American military history	201	183	66%
See historic objects	199	184	66%

those who departed from Patriots Point chose to visit the Naval Museum/Yorktown that day. Table 3 presents the most common activities combined with a Fort visit.

<b>Table 3: Top Activities Combined with a Visit to Fort Sumter<sup>1</sup></b>			
	<b>Patriots Point</b>	<b>City Marina</b>	<b>Percent of Total</b>
Fort visit is today's only activity	63	43	18%
Combine Fort visit with another activity	244	230	81%
<b>Total<sup>2</sup></b>	<b>309</b>	<b>274</b>	<b>583</b>
<b>Top activities combined with Fort visit:</b>			
Patriots Point	106	19	26%
Walking around Charleston	92	140	49%
Charleston Historic District	75	118	41%
City Market	53	107	34%
Shopping	53	96	31%
Beaches	49	34	18%
S.C. Aquarium	26	38	14%
<b>Total</b>	<b>244</b>	<b>230</b>	<b>474</b>
<sup>1</sup> Results based on responses to Question 7 on page 5 of <i>Survey of Fort Sumter Visitors</i> .			
<sup>2</sup> Responses to do not sum because the total includes nonresponses.			

### **Interaction between Fort Sumter and Patriots Point**

Under the current commercial plan, both Fort Sumter and Patriots Point enjoy some benefits by being located together. Co-location allows visitors to see two major Charleston-area attractions in one place and allows the two attractions to capitalize on incidental visits (e.g., visitors who do not plan on seeing both the Fort and the Yorktown until after arriving at Patriots Point). These benefits, however, are not as significant as initially anticipated. Among the surveyed visitors departing from Patriots Point, results suggest that nearly two-thirds of the Fort visitors do not visit the Naval Museum or Yorktown. Thirty-six out of 309 respondents, or 12 percent, chose to see only the Fort and the Yorktown/Naval Museum that day. Thirty-one percent choose to see only the Fort and Charleston (e.g., walking around Charleston, historic district or City Market). Most respondents combined their visit to Fort Sumter with more than one other activity that day. (See Table 3 for more detail.)

In order to assess the share of visitation that can be considered incidental and due to being located at Patriots Point, IEC calculated the number of respondents who did not plan on visiting the Fort. A higher percentage of visitors departing from Patriots Point than from the City Marina considered their visit to the Fort “unplanned” (14 percent and 11 percent, respectively). Among

this portion of respondents departing from Patriots Point, six out of 43 reported visiting the Yorktown/Navel Museum that day. This suggests that less than two percent of Fort tourists departing from Patriots Point can be attributed to incidental visits generated by the departure point's co-location with the Yorktown.

### **Lodging Preferences of Fort Sumter Visitors**

Approximately 87 percent of the surveyed Fort Sumter visitors stayed overnight in the Charleston area. On average visitors stayed for three nights. Respondents departing from Patriots Point generally stayed slightly longer than those departing from the City Marina. As expected, respondents departing from the City Marina tended to stay in downtown Charleston, and respondents departing from Patriots Point tended to stay in Mount Pleasant.

Below is a summary of the location and type of accommodations in which respondents stayed by departure point<sup>7</sup>:

- *City Marina:* 52 percent of the respondents stayed in downtown Charleston; 18 percent stayed in North Charleston. Less than four percent stayed in Mount Pleasant. The three most frequently selected types of lodging are hotels, bed and breakfasts or inns, and motels.
- *Patriots Point:* 30 percent of the respondents stayed in Mount Pleasant; 18 percent stayed in downtown Charleston; 18 percent stayed in North Charleston. The three most frequently selected types of lodging are hotels, motels, and beach houses or condos.

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<sup>7</sup> For more detail, see Table A-4 in the appendix.



## **Survey of S.C. Aquarium Visitors**

IEc administered the *Survey of Charleston Area Visitors* and the *Survey of Charleston Area Residents* for two days during July (July 21 and July 22, 2000).<sup>8</sup> During the two days, surveyors intercepted respondents as they entered and left the S.C. Aquarium, offering free soda or ice water as an incentive for completing the survey. If visitors agreed to take the survey, interceptors asked two screening questions (same screening questions used in the *Survey of Fort Sumter Visitors*), handed the individual a survey, and directed the respondent to tables located under a nearby tent. IEc opted for this intercept strategy for several reasons. First, given the heat and humidity, visitors were often unwilling to stop to complete a survey. Second, it was the most cost-effective (i.e., reduced time necessary to complete the survey). Table 4, below, summarizes the number of surveys collected.

<b>Table 4: Survey Administered at the S.C. Aquarium, Number of Observations by Date</b>			
<b>Survey</b>	<b>Friday, July 21, 2000</b>	<b>Saturday, July 22, 2000</b>	<b>Total<sup>1</sup></b>
Survey of Charleston Area Visitors	101	274	379
Survey of Charleston Area Residents	55	63	118
<sup>1</sup> Total includes surveys that do not have dates recorded.			

## **Demographic Profile of S.C. Aquarium Visitors**

Overall, Aquarium visitors (resident and nonresident) have educational backgrounds, household size, and median incomes that are similar to Fort visitors. The majority of respondents have at least some college education or a degree from a technical or trade school. The average age of aquarium visitors is also similar to that of Fort visitors (45 percent of aquarium respondents are between the ages of 35 and 49). Aquarium visitors, however, tend to be more representative of younger visitors. Adults between the ages of 21 and 34 comprise 29 percent of the surveyed population, while 21 percent are at least 50 years of age. The difference in age distribution is consistent with the difference between Fort visitors and Aquarium visitors regarding employment status. There are nearly twice as many retired individuals among Fort visitors compared to Aquarium visitors (13 percent and 5.6 percent, respectively). The respondents of the surveys administered in front of the Aquarium also represent a more racially-diverse pool of tourists. Of respondents at the S.C. Aquarium, 87 percent are white/Caucasian (compared to 93 percent of Fort respondents). Seven percent of the aquarium survey respondents are African American/Black, with an additional three percent represented by Latinos, American Indians, and Asians.

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<sup>8</sup> We conducted a pretest of the survey on July 19, 2000.

Approximately 76 percent of adult S.C. Aquarium visitors are not residents of the Charleston area. Nearly 54 percent of the nonresidents reside in the state of South Carolina. Similar to Fort visitors, the highest concentration of visitors reside in two states, North Carolina and Georgia (19.4 percent and 9.4 percent, respectively). The distribution of visitors by state is summarized in Table A-5 of the appendix. Of the Charleston area residents, 73 percent live in Charleston County. Another 23 percent live in either Berkley County or Dorchester County. The distribution of visitors by county is summarized in Table A-6 of the appendix.

### **Visiting the S.C. Aquarium**

A higher percentage of respondents, as compared to Fort visitors, identified the S.C. Aquarium as a primary destination for their visit to the Charleston area. Of Aquarium visitors (who do not live in the Charleston area), 35 percent identified it as their “primary” destination, and another 25 percent identified their visit to the Aquarium as “one of a few major” destinations. The Aquarium, however, has a higher rate of unplanned visits when compared to Fort Sumter (24 percent versus 12.5 percent, respectively). Similar to Fort Sumter visitors, most Aquarium visitors planned their visit prior to arriving in Charleston. The five other main attractions are: (i) City Market, (ii) Charleston Historic District, (iii) area beaches, (iv) Waterfront Park, and (v) Fort Sumter. See Table A-3 of the appendix for more detail.

A slightly higher percentage of Aquarium visitors (compared to Fort visitors) reported the visit as their only activity that day. Over half of the resident visitors and 28 percent of the nonresident visitors saw only the Aquarium that day. The top two activities with which nonresidents chose to combine their Aquarium visit are going to the City Market or shopping. For residents, the top two activities are shopping and walking around Charleston. Table 5, below, summarizes their activities.

<b>Table 5: Top Activities Combined with a Visit to the S.C. Aquarium</b>		
	<b>Nonresidents<sup>1</sup></b>	<b>Residents<sup>2</sup></b>
Aquarium visit is the only activity	107 (28%)	61 (51%)
Combine Aquarium visit with another activity	268 (71%)	54 (45%)
<b>Total<sup>3</sup></b>	<b>379</b>	<b>119</b>
<b>Top activities combined with aquarium visit:</b>		
City Market	121 (45%)	19 (35%)
Shopping	94 (35%)	25 (46%)
Charleston Historic District	84 (31%)	4 (7%)
Beaches	81 (30%)	13 (24%)
Walking around Charleston	48 (18%)	21 (39%)
Waterfront Park	36 (13%)	8 (15%)
Other- specified IMAX	8 (3%)	7 (13%)
Patriots Point	18 (7%)	4 (7%)
Fort Sumter	14 (5%)	1 (2%)
<b>Total</b>	<b>268</b>	<b>54</b>
<sup>1</sup> Results based on responses to Question 4 on page 5 of <i>Survey of Charleston Area Visitors</i> .		
<sup>2</sup> Results based on responses to Question 4 on page 4 of <i>Survey of Charleston Area Residents</i> .		
<sup>3</sup> Responses to do not sum because the total includes nonresponses.		

### **Lodging Preferences of Charleston Area Tourists Visiting the S.C. Aquarium**

Compared to Fort Sumter visitors, the S.C. Aquarium attracts a higher percentage of visitors who take a day-trip to Charleston. Three-quarters of the Aquarium visitors stayed overnight in the area, while 87 percent of the Fort visitors stayed overnight. Aquarium visitors stayed an average of three nights. Thirty-four percent of the Aquarium visitors stayed in downtown Charleston, 16 percent stayed in Mount Pleasant and another 16 percent stayed in North Charleston. Of those visitors staying overnight, 44 percent stayed in a hotel and 20 percent stayed with friends or relatives. For more detail, see Table A-4 of the appendix.

## **DEFINING FUTURE TRENDS IN FORT SUMTER VISITATION**

The new Fort Sumter Visitors Center will have greater exposure to Charleston area visitors, resulting in an increase in visitation at the Fort. This gain in visitation more than offsets the loss of visitors who prefer the current scenario of two departure points, Patriots Point in Mount Pleasant and the City Marina in Charleston.

IEc estimated the net change in visitation based on the results of two surveys, *Survey of Fort Visitors* and *Survey of Charleston Area Visitors*. The survey of Fort visitors established the baseline and a measure of the potential visitation loss that Fort Sumter may experience as a result of the new commercial services plan. The *Survey of Charleston Area Visitors* assesses the willingness and interest of tourists to combine their visit to the S.C. Aquarium with a visit to Fort Sumter. This forms the basis for estimating the potential gain in visitation associated with opening the Fort Sumter Visitors Center and departure point next to the S.C. Aquarium. IEC used 1998 FOSU visitation data to estimate the net change in Fort visitation (i.e., current visitation, less losses from those who prefer the current scenario, plus gains from those who would visit due to the new site's location).

### **Preferences between the Current and Future Scenarios**

The survey asked Fort visitors to choose between two Fort management options based on brief descriptions of eight attributes. Option A presents the current scenario of two departure points (Patriots Point and the City Marina). Option B presents the future scenario of a museum/visitors center and single departure point located in Charleston. Slightly less than half of the surveyed respondents preferred the future scenario, Option B. When comparing the choices by departure point, respondents departing from Patriots Point had a stronger preference for the status quo. The most frequently cited reasons for preferring the current to the future scenario are: (i) departure point locations, (ii) availability of free parking, (iii) number of boat departures per day, and (iv) not having to drive into downtown Charleston.

Nearly half of the respondents departing from the City Marina and one-third of the respondents leaving from Patriots Point preferred Option B, the future scenario. The three primary reasons for choosing Option B are: (i) having more flexibility in the amount of time that they could spend at the Fort, (ii) having an average of six boats leaving per day (one every hour), and (iii) having rangers available to answer questions and give historical talks.

## **Net Effect on Visitation**

In 1998, Fort visitation was approximately 240,000. Assuming future visitors attitudes and behaviors are like those of current visitors, an estimated 20,600 visits to the Fort will be lost due to the consolidation of departure point to the new site in Charleston. At the same time, the Fort should gain an estimated 45,600 visits due to its new location next to the S.C. Aquarium. The net effect of these gains and losses is an increase in annual Fort Sumter visitation by approximately ten percent (or an additional 25,000 visitors per year).

## **Visitation Loss**

We estimate loss of visitation based upon responses by nonresidents of the Charleston area (i.e., *Survey of Fort Sumter Visitors*). We identify these “nonmovers” (i.e., the portion of Fort visitors who would not visit the Fort had the boat departure been from the new site) based upon their response to the following question:

*If the Superintendent decided on Option B [single departure point, located at the new site next to the aquarium], would you still have visited the Fort on this trip?*

Overall, 86 percent of surveyed Fort visitors answered “Yes” (i.e., they would have still visited the Fort). Approximately 8.6 percent of all respondents answered “No,” that they would not have visited the Fort had the new site been their only choice (50 of the 583). Patriots Point had a higher rate of “nonmovers”. Of the respondents departing from Patriots Point, 12 percent would not have visited the Fort had the new site been available, compared to five percent of the respondents leaving from the City Marina. In 1998, the annual visitation for Fort Sumter was approximately 240,000. Estimated visitation loss is about 8.6 percent or an annual loss of 20,600 visitors. This estimated loss does not distinguish between planned and incidental visits. Table 6 summarizes the response to this question.

<b>Table 6: Identifying “Nonmovers”<sup>1</sup></b>			
	<b>Patriots Point</b>	<b>City Marina</b>	<b>Total</b>
Yes- Would have visited the Fort	258 (83%)	245 (89%)	503 (86%)
No- Would not have visited the Fort	36 (12%)	14 (5%)	50 (9%)
Skips	15 (5%)	15 (6%)	30 (5%)
Total Number of Responses	309	274	583
<sup>1</sup> Results based on responses to Question 2 on page 10 of <i>Survey of Fort Sumter Visitors</i> .			

## Visitation Gain

The gain in visitation reflects only responses by visitors who are not residents of the Charleston area (i.e., *Survey of Charleston Area Visitors*) and represent potential incidental Fort visitors. These respondents are individuals that meet all of the following criteria:

- *Go to the visitors center and ride the boat.* Respondents that would have gone to the new visitors center and ridden the boat to Fort Sumter had the new facility been open and available to them on their trip to Charleston. Including only the respondents that would do both suggests a slightly stronger interest. Table 7 below summarizes the responses to this question.
- *Not planning on visiting Fort Sumter.* To avoid potential double counting, the estimate of increased visitation does not include respondents who planned on visiting the Fort.
- *Staying overnight in the Charleston area for at least two nights.* There is some uncertainty associated with whether all respondents would have, in fact, gone had the new facility been open. This criteria helps to ensure that visitors would have time to visit the Fort during their trip to the Charleston area.

<b>Table 7: Incidental Visits to Fort Sumter</b>	
<b>If the new visitors center facility was open and available to you on this trip to Charleston, which of the following would you do on this trip? <sup>1</sup></b>	<b>Number of Respondents</b>
Visit the new Fort Sumter visitors center	56 (15%)
Ride the boat to see Fort Sumter	61 (16%)
Both	129 (34%)
None of the above	133 (35%)
<b>Total</b>	<b>379</b>
<sup>1</sup> Responses based on Question 2 on page 9 of the <i>Survey of Charleston Area Visitors</i> .	

Approximately one-third of the respondents to the *Survey of Charleston Area Visitors* indicated that they would go to the Visitors Center and ride the boat to Fort Sumter if the new site was open. After making the additional two adjustments, approximately ten percent of the respondents represent potential incidental Fort visitors. Table 8 summarizes the number of respondents meeting the criteria.

<b>Table 8: Estimating the Gain in Fort Sumter Visitation among Aquarium Visitors</b>			
<b>Criteria for identifying the portion of S.C. Aquarium visitors who would have visited Fort Sumter</b>	<b>Number of Respondents</b>	<b>Percent of Respondents</b>	<b>Annual Number of Potential Fort Visitors<sup>1</sup></b>
Both- Gone to the visitors center & ridden the boat to Fort Sumter	129	34%	155,000
& not planning to visit Fort Sumter	59	16%	73,000
& staying overnight for at least 2 nights	38	10%	45,600
<sup>1</sup> Based on annual estimate of 456,000 visitors to the S.C. Aquarium who do not live in the Charleston area.			

The S.C. Aquarium projects visitation this year will be between 500,000 and 700,000.<sup>9</sup> In order to estimate the gain in Fort visitation, we adjust the Aquarium's visitation level to reflect visitors who did not live in the Charleston area. Based on the ratio of residents to nonresidents on the dates we administered surveys near the Aquarium, approximately 24 percent of the visitors are residents of the area and 76 percent of nonresidents. Using the midpoint of expected S.C. Aquarium visitation (600,000 visitors per year) and adjusting for residency, approximately 456,000 visitors of the Aquarium do not live in the Charleston area. Had the new visitors center been open, survey results suggest that 10 percent of the aquarium visitors would have visited the Fort. This is equivalent to approximately an additional 45,600 tourists visiting Fort Sumter.

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<sup>9</sup> Based on press release titled "South Carolina Aquarium Exceeding Expectations." See <http://www.scaquarium.org/new/pr/225000.htm>.

## **Demand for More Time at the Fort**

A single departure point will provide visitors with:

- increased flexibility in the length of their stay at Fort Sumter through the option of returning on a more conveniently scheduled boat; and
- a shorter waiting period between boat departures.

While over 90 percent of the respondents enjoyed their visit a “great deal” or “a lot”, roughly one-third wanted more time to explore the Fort. By operating boat service to the Fort from a single departure point, visitors have increased flexibility in the length of their stay through the option of returning on a more conveniently scheduled boat. Under the current service plan, each departure site has one boat which makes three trips per day. The trip is 2.5 hours which allows visits about an hour to explore the Fort. Currently, visitors can stay at the Fort for more than an hour, but they have to wait over an hour and a half for the next boat. Among the visitors that prefer to have more time at the Fort, less than seven percent wanted more than one hour; most wanted an additional half hour. Table 9 provides the distribution visitors wanting more time at the Fort.

<b>Table 9: Demand for More Time at Fort Sumter</b>						
	<b>Patriots Point</b>		<b>City Marina</b>		<b>Total</b>	
	<b>Count</b>	<b>Percent</b>	<b>Count</b>	<b>Percent</b>	<b>Count</b>	<b>Percent</b>
<b>Would like more time</b>	103	33%	94	34%	197	33%
<b>Felt had enough time</b>	204	66%	180	66%	384	66%
<b>Total<sup>1</sup></b>	309	100%	274	100%	583	100%
<b>Would like more time</b>						
additional ½ hour	61	59%	67	71%	128	65%
additional hour	34	33%	18	19%	52	26%
more than additional hour	8	8%	5	5%	13	7%
skips	-	-	4	4%	4	2%
<b>Total</b>	103	100%	94	100%	197	100%

<sup>1</sup> Ts do not sum due to non-responses.100%



### **Demand for a Water Taxi Service**

Among both Fort Sumter visitors and S.C. aquarium visitors, approximately 32 percent would “definitely” use or “most likely” use a taxi service that ran between Mt. Pleasant and downtown Charleston. Willingness to use a water taxi service is slightly higher among visitors staying in Mt. Pleasant when compared to those staying in downtown Charleston. Table 10 summarizes responses to the use of a water taxi service.

<b>Table 10: Use of a Water Taxi Service</b>						
	<b>Aquarium visitors</b>		<b>Fort Sumter visitors</b>		<b>Total</b>	
	<b>Non-residents</b>	<b>Residents</b>	<b>Patriots Point</b>	<b>City Marina</b>	<b>Count</b>	<b>Percent</b>
Definitely use	53 (14%)	28 (23%)	60 (19%)	39 (14%)	180	17%
Most likely use	49 (13%)	21 (18%)	53 (17%)	42 (15%)	165	15%
Might use	94 (25%)	33 (28%)	63 (20%)	71 (25%)	261	24%
Not use	46 (12%)	24 (20%)	38 (12%)	30 (11%)	138	13%
Not sure <sup>1</sup>	137 (36%)	13 (11%)	95 (31%)	92 (34%)	337	31%
<b>Total</b>	<b>379</b>	<b>119</b>	<b>309</b>	<b>274</b>	<b>1,081</b>	<b>100%</b>
<sup>1</sup> Includes non-responses.						

## REGIONAL ECONOMIC IMPACTS

### Impact on Patriots Point

In 1998 annual revenues for Patriots Point was \$5.4 million. Patriots Point potentially may lose between two and 12 percent of its annual revenues (or between \$114,600 and \$641,600) due to relocating the Fort Sumter departure to the new site next to the S.C. Aquarium. We estimate the revenue loss based on the number of people who may not go to Patriots Point as a result of moving the Fort's departure point. Among surveyed visitors departing from Patriots point, 12 percent (36 of 309 respondents) chose to see only the Fort that day; 31 percent (97 of 309 respondents) combined their visit to the Fort with a visit to the Navel Museum. These values form lower- and upper-bound estimates. We use the dollar per person estimates for the various sources of revenues that are presented by Patriots Point.<sup>10</sup> Table 11 summarizes how we estimated the potential revenue loss.

Operating a water taxi service between Patriots Point and the Fort Sumter Visitor Center may significantly offset the revenue loss by:

- *Attracting S.C. Aquarium and Fort Sumter tourists to Patriots Point.* Operating a water taxi may result in incidental visits to Patriots Point. Almost one-quarter of aquarium visitors who are staying over night in the Charleston area, but not in Mount Pleasant or planning to visit sites in or around Mt. Pleasant, expressed interest in using the water taxi service.
- *Increased visitation by tourists staying in Mount Pleasant.* Patriots Point should experience an increase in visitation due to incidental visits of tourists staying in the Mount Pleasant area and using the water taxi to access Charleston. For 23 percent of the aquarium visitors staying in Mount Pleasant, it was their first trip to the Charleston area. Over half of these visitors did not identify Patriots Point or the Fort as sites that they plan to see and all of these visitors expressed interest in using a water taxi to access Charleston.
- *Potential parking revenues.* Currently, parking at Patriots Point is free. By charging a small parking fee, Patriots Point could potentially offset their revenue loss.

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<sup>10</sup> See Patriots Point Development Authority's position paper, dated December 9, 1999.

**Table 11: Estimated Revenue Loss for Patriots Point**

<b>Fort Sumter visitors departing from Patriots Point:</b>	<b>Number of Respondents</b>	<b>Total Number Surveyed</b>	<b>Percent of Total Number Surveyed</b>	<b>Number of visitors lost at Patriots Point<sup>1</sup></b>
Only went to the Fort that day <sup>2</sup>	36	309	12 %	15,100
<b>Sources of Patriots Point Revenues</b>	<b>Cost per Person</b>	<b>Lost Visitation</b>	<b>Lost Revenues</b>	
Admissions	\$8.95	0	\$ 0	
Gift Shop	\$5.12	15,100	\$ 77,300	
Snack Bar	\$1.32	15,100	\$ 19,900	
Ticket Sales	\$0.14	129,209	\$ 17,400	
<b>Total Revenue Loss:</b>			<b>\$ 114,600</b>	
<b>Fort Sumter visitors departing from Patriots Point:</b>	<b>Number of Respondents</b>	<b>Total Number Surveyed</b>	<b>Percent of Total Number Surveyed</b>	<b>Number of visitors lost at Patriots Point<sup>1</sup></b>
Went to Patriots Point and the Fort on the same day <sup>2</sup>	97	309	31%	40,560
<b>Sources of Patriots Point Revenues</b>	<b>Cost per Person</b>	<b>Lost Visitation</b>	<b>Lost Revenues</b>	
Admissions	\$8.95	40,560	\$ 363,000	
Gift Shop	\$5.12	40,560	\$ 207,700	
Snack Bar	\$1.32	40,560	\$ 53,500	
Ticket Sales	\$0.14	129,209	\$ 17,400	
<b>Total Revenue Loss:</b>			<b>\$ 641,600</b>	
<sup>1</sup> Based on 1998 annual FOSU visitation departing from Patriots Point: 129,209. <sup>2</sup> Based on responses to Question 7 on page 5 of the <i>Survey of Fort Sumter Visitors</i> .				

### **Impact on Mt. Pleasant's Economy**

The town of Mount Pleasant in recent years has experienced significant growth in population and economic development. One contributing factor to this economic growth is the development of a hotel industry, which also leads to development of business catered towards tourists (e.g., restaurants, retail shops, etc.). We focus our assessment of potential impacts on the Mount Pleasant economy on visitors' lodging choice given the importance of this industry. While the visiting Fort Sumter is among the many tourist destinations in the Charleston area, there is little evidence suggesting that visitors would change their lodging choice if the Fort no longer offered a departure point at Patriots Point. As a result, the potential impact of the FOSU plan should have a minimal impact on Mount Pleasant's economy.

There should be little effect on visitors' lodging choice for two reasons. First, lodging choice is driven primarily by costs and ease of getting to a variety of attractions in the Charleston area. Second, a small portion of visitors departing from Patriots Point stayed overnight in Mount Pleasant. There are a variety of factors that influence the lodging choice of Fort visitors departing from Patriots Point. In our survey, we asked visitors to identify the reasons for their lodging choice. Table 12 summarizes their responses. For respondents staying in Mount Pleasant, the most frequently identified reason for lodging selection is cost, followed by the ease of getting to the Charleston historic district. They did identify the ease of getting to Fort Sumter as a factor, but only after cost, accessibility of the historic district and other attractions, and availability of rooms. In addition to the Fort not playing a significant role in lodging choice, a small share of the visitors departing from Patriots Point actually stayed overnight in Mount Pleasant. One-quarter (or 78 out of 309) stayed overnight in Mount Pleasant.<sup>11</sup> Nearly all of these respondents planned to visit sites in Charleston.

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<sup>11</sup> This estimate may actually overstate the number staying overnight given that we were unable to intercept only one adult from each party visiting the Fort.

**Table 12: Lodging Choice of Fort Sumter Visitors  
Departing from Patriots Point**

<b>Reason for Lodging Location</b>	<b>Percent of Visitors Staying in Charleston<sup>1</sup></b>	<b>Percent of Visitors Staying in Mt. Pleasant<sup>1</sup></b>
Easy to get to historic district	75%	48%
Easy to get to other attractions	21%	60%
Easy to get to Fort Sumter	15%	35%
Near shopping	19%	11%
Easy to get to beaches	6%	28%
Near friends or relatives	10%	11%
<b>Reasons for Lodging Choice</b>	<b>Percent of Visitors Staying in Charleston<sup>1</sup></b>	<b>Percent of Visitors Staying in Mt. Pleasant<sup>1</sup></b>
Cost	38%	63%
Unique or quaint	33%	3%
Familiarity with lodgings	21%	18%
Availability	21%	37%
Part of a national chain	19%	34%
Amenities	17%	15%
Parking	4%	5%
Promotions	8%	6%

<sup>1</sup> Total number of respondents departing from Patriots Point and staying in Charleston is 48.  
The total number staying in Mount Pleasant is 79.

## **Parking**

The new Fort departure point and visitors center will share a parking garage with the S.C. Aquarium and I-MAX theater. Currently, most visitors find parking convenient and that it costs about the same as other sites in the area. Table 13 summarizes responses regarding parking. It is not clear how opening the new FOSU site will affect parking in the area. The number of required parking spaces should not increase by the full amount of Fort visitors. Many tourist will opt to combine seeing the Aquarium, theatre, and/or Fort on the same day. In addition, tourist may choose alternatives to driving (e.g., trolley).

**Table 13: S.C. Aquarium Visitors' Opinions About Parking**

	<b>Resident</b>	<b>Nonresident</b>	<b>Total</b>
<b>Did not drive to the Aquarium</b>	2 (2%)	44 (12%)	46 (9%)
<b>Did drive to the Aquarium</b>	105 (89%)	330 (87%)	435 (87%)
<b>Cost of Parking</b>			
Costs <i>less</i> than other sites.	5 (5%)	20 (6%)	25 (6%)
Costs <i>about the same</i> as other sites.	49 (46%)	141 (43%)	190 (44%)
Costs <i>more</i> than other sites.	21 (20%)	41 (12%)	62 (14%)
No opinion <sup>1</sup>	32 (30%)	128 (39%)	160 (37%)
<b>Convenience of Parking</b>			
Very convenient	86 (80%)	225 (68%)	311 (71%)
Somewhat convenient	17 (16%)	86 (26%)	103 (24%)
Not convenient at all	1 (1%)	8 (2%)	9 (2%)
No opinion <sup>1</sup>	3 (3%)	11 (3%)	14 (3%)
<b>Total</b>	<b>105 (100%)</b>	<b>330</b>	<b>435</b>

<sup>1</sup> Includes non-responses.

## **APPENDIX A- TABLES**

**Table A-1: Demographics Survey Respondents-  
Fort Sumter and S.C. Aquarium**

Demographic	Fort Sumter Visitors	Aquarium Visitors	
		Nonresidents	Residents
Gender			
Female	(47%)	180 (48%)	67 (57%)
Male	(47%)	161 (42%)	46 (39%)
Race			
White	(93%)	331 (87%)	104 (87%)
African American/ Black	(1.5%)	27 (7%)	8 (7%)
Latino	(2.6%)	2 (0.5%)	1 (0.85%)
American Indian	(1.5%)	4 (1%)	2 (1.69%)
Asian	(1.2%)	8 (2%)	0
Other	-	7 (2%)	4 (4.25%)
Age			
21-24	19 (3%)	23 (6%)	5 (4%)
25-34	86 (15%)	91 (24%)	26 (22%)
35-49	254 (44%)	169 (45%)	54 (46%)
50-64	162 (28%)	73 (19%)	22 (19%)
65+	39 (7%)	10 (3%)	7 (6%)
Education			
Some HS	5 (1%)	3 (1%)	1 (0.85%)
HS or GED	74 (13%)	43 (11%)	10 (8.5%)
Some College	105 (18%)	60 (16%)	19 (16%)
Technical or Trade School	29 (5%)	31 (8%)	7 (6%)
College degree	192 (33%)	123 (32%)	37 (31%)
Graduate School	109 (19%)	57 (15%)	31 (26%)
Advanced Degree	46 (8%)	43 (11%)	11 (9%)
Employment			
Full-time	396 (68%)	286 (75%)	82 (69.5%)
Part-time	37 (6%)	21 (5.5%)	10 (8.5%)
Full-time homemaker	32 (6%)	21 (5.5%)	7 (6%)
Retired	175 (3%)	18 (5%)	10 (8.5%)
Student	8 (1%)	11 (3%)	4 (3%)
Not employed	12 (2%)	3 (1%)	1 (0.85%)
Median Household Income <sup>1</sup>	\$50,000-\$74,999	\$50,000-\$74,999	\$50,000-\$74,999
Average household size	3	3	3
Total number of surveys	583	379	119

<sup>1</sup> Nine skips or ~8% did not answer this question.



<b>Table A-2: Distribution of Fort Sumter Visitors by State of Residence</b>		
<b>Region</b>	<b>States</b>	<b>Percent of Respondents</b>
South Carolina		12.7%
South East	FL, GA, NC	30.7%
Great Lakes- Midwest	IL, IN, MI, MN, MO, OH, WI	15.5%
Mid-Atlantic	DE, MD, NJ, NY, PA, VA	14%
South	AL, AR, KY, LA, MS, TN, WV,	10.5%
Pacific	CA, ID, NV, OR, WA, HI	7.2%
Southwest	AZ, NM, OK, TX	5.8%
New England	MA, ME, NH, RI, VT	2.3%
Mountain-Prairie	CO, KX, NE, SD	1.5%

<b>Table A-3: Top Charleston Area Attractions<sup>1</sup></b>		
<b>Charleston Area Attractions</b>	<b>Fort Sumter Visitors</b>	<b>S.C. Aquarium Visitors</b>
Fort Sumter	-	<b>27%</b>
S.C. Aquarium	26%	-
Charleston Historic District	<b>79%</b>	<b>60%</b>
City Market	<b>61%</b>	<b>61%</b>
Patriots Point/Naval Museum	<b>44%</b>	25%
Area Beaches	<b>35%</b>	<b>48%</b>
Waterfront Park	<b>29%</b>	<b>35%</b>
Boone Hall	22%	14%
Magnolia Gardens	21%	10%
Charleston Museum	17%	16%
Middleton Place	13%	6%
Fort Moultrie	13%	13%
Drayton Hall	11%	6%
Charles Pinckney Place	4%	2%
Other	10%	23%
<b>Total respondents</b>	<b>583</b>	<b>379</b>
<sup>1</sup> Reported results reflect response of visitors who do not live in the Charleston area.		

<b>Table A-4: Lodging Location and Type for Charleston Area Visitors</b>				
	<b>Patriots Point</b>	<b>City Marina</b>	<b>Total Fort Visitors</b>	<b>Aquarium Visitors</b>
<b>Staying overnight</b>	266 (86%)	242 (88%)	508 (87%)	286 (75%)
<b>Not staying over night</b>	43 (14%)	32 (12%)	75 (13%)	93 (25%)
<b>Total</b>	<b>309</b>	<b>274</b>	<b>583</b>	<b>379</b>
<b>Lodging Location</b>				
Downtown Charleston	48 (18%)	125 (52%)	173 (34%)	98 (34%)
Mt. Pleasant	79 (30%)	9 (4%)	88 (17%)	47 (16%)
North Charleston	49 (18%)	44 (18%)	93 (18%)	45 (16%)
Isle of Palm	25 (9%)	1 (0.4%)	26 (5%)	21 (7%)
Other	49 (18%)	58 (24%)	107 (21%)	77 (27%)
<b>Lodging Type</b>				
Hotel	127 (48%)	124 (51%)	251 (49%)	126 (44%)
Motel	57 (21%)	34 (14%)	91 (18%)	35 (12%)
Bed and Breakfast/Inn	9 (3%)	41 (17%)	50 (10%)	21 (7%)
Beach house/Condo	21 (8%)	6 (2%)	27 (5%)	32 (11%)
Friends/Relatives	20 (8%)	17 (7%)	37 (7%)	56 (20%)
Other	20 (8%)	14 (6%)	34 (7%)	16 (6%)
<b>Totals<sup>1</sup></b>	<b>266</b>	<b>242</b>	<b>508</b>	<b>286</b>
<sup>1</sup> Columns do not sum due to non-responses.				

<b>Table A-5: Distribution of Charleston Area Visitors by State<sup>1</sup></b>		
<b>Region</b>	<b>States</b>	<b>Percent of Total Respondents</b>
South Carolina		53.7%
South East	FL, GA, NC	31.7%
Mid-Atlantic	MD, NJ, NY, PA, VA	6.8%
Great Lakes- Midwest	IL, IN, MI, MO, OH, WI	3.9%
South	MS, TN, WV	2.4%
Mountain-Prairie	CO, NE	0.6%
New England	CT, VT	0.6%
Southwest	NM, TX	0.6%
<sup>1</sup> Results based on the <i>Survey of Charleston Area Visitors</i> .		

<b>Table A-6: Distribution of Charleston Area Residents by County<sup>1</sup></b>	
<b>Counties</b>	<b>Percent of Total Respondents</b>
Charleston	72.7%
Dorchester	12.3%
Berkeley	10.5%
Lexington	1.9%
Colleton	0.9%
Richland	0.9%
Spartanburg	0.9%
<sup>1</sup> Results based on the <i>Survey of Charleston Area Visitors</i> .	

## **APPENDIX B- SURVEY INSTRUMENTS**

# **SURVEY OF FORT SUMTER VISITORS**



**Thank you very much for taking a few minutes to complete this survey concerning your visit to Fort Sumter!**

**The purpose of this survey is to help the National Park Service in managing this historic site. Your answers are entirely confidential. Please answer every question. Thank you!**

## TOURIST ACTIVITIES

**1 Is this your first visit to the Charleston area?**

*(Please circle one number.)*

1 Yes

2 No

**2 Which of the following best describes the main purpose of your visit to the Charleston area?**

*(Please circle one number.)*

1 Visit family or friends

5 Attend special event(s)

2 Sightseeing

6 Vacation

3 Visit beaches

7 Learn about history

4 Business

8 Other: \_\_\_\_\_

**3 Which of the following attractions have you visited or do you plan to visit on this trip to the Charleston area? (Please circle all that apply.)**

1 Charleston Historic District

8 Magnolia Gardens

2 Charleston Museum

9 Drayton Hall

3 City Market

10 Middleton Place

4 S. C. Aquarium

11 Waterfront park

5 Fort Moultrie

12 Charles Pinckney Historic Site

6 Patriot's Point/Naval Museum

13 Area beaches

7 Boone Hall Plantation

14 Other: \_\_\_\_\_



## FORT SUMTER- Your Visit

**1 Which statement best describes this visit to Fort Sumter?**

*(Please circle one number.)*

- 1 It was a primary destination.                      3 It was one of many destinations.
- 2 It was one of a few major destinations.        4 It was an unplanned visit.

**2 When did you consider visiting the Fort?**

(Please circle one number.)

- 1 Before coming on this trip to the Charleston area.
- 2 After arriving in the Charleston area.

**3** How many people are in your party (including yourself)?

- 1 Number *under* 18 years of age: \_\_\_\_\_
- 2 Number *over* 18 years of age: \_\_\_\_\_

**4 Are you traveling as part of an organized tour group?**

(Please circle one number.)

- 1 Yes                      2 No

**5 People visit Fort Sumter for many reasons, some of which are listed below. Which of the following are reasons for your visit to the Fort today?**  
(Please circle all that apply.)

1 Take or accompany family or friends on an outing.

5 Learn about American history and/or American military history.

2 Visit a National Park site.

6 Attend a school field trip.

3 See historic objects.

7 View Charleston Harbor by boat.

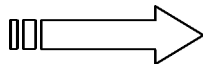
4 Visit a Civil War site.

8 Other: \_\_\_\_\_

**6 How long do you plan to sight-see *today*?**

Time you started sight-seeing today: \_\_\_\_\_


Time you plan to end your sight-seeing today: \_\_\_\_\_



**Next Page**

**7** Is this visit to the Fort the *only* activity that you have planned for today?  
(Please circle one number.)

1 Yes

2 No  (If "No") What other activities do you have planned for today?  
(Please circle all that apply.)

1 Patriot's Point/Naval Museum

9 Magnolia Gardens

2 Fort Moultrie

10 Drayton Hall

3 S. C. Aquarium

11 Middleton Place

4 City Market

12 Waterfront park

5 Walking around Charleston

13 Boone Hall Plantation

6 Shopping

14 Charles Pinckney Historic Site

7 Charleston Historic District

15 Area beaches

8 Charleston Museum

16 Other: \_\_\_\_\_

## **FORT SUMTER- Reaching Fort Sumter**

**1** Did you know that there are two departure points for reaching Ft. Sumter, the City Marina in Charleston and Patriot's Point in Mount Pleasant?  
(Please circle one number.)

1 Yes

2 No

**2 How did you learn about boat departure points for the Fort?**

*(Please circle all that apply.)*

- |   |                     |
|---|---------------------|
| 1 Called Fort Sumter                        | 5 Directional signs |
| 2 Tour books                                | 6 Other advertising |
| 3 Brochures                                 | 7 Word of mouth     |
| 4 Visitor Center: <i>(Specify location)</i> | 8 Other: _____      |
| _____                                       |                     |

**3 Boats leave for Fort Sumter three times a day from each departure point (Patriot's Point and the Charleston City Marina). Did you feel that the Fort Sumter boat departure times were convenient for you on this visit today?**

*(Please circle one number.)*

1 Yes

2 No



(If "No") Why not?

---

---

---

**4 Please rate the following as they relate to your experience reaching Fort Sumter today. *(Please circle one number for each.)***

	Poor	Fair	Good	Excellent	No Opinion
a. Availability of parking at tour boat terminal.	1	2	3	4	5
b. Walking distance from your car to the facility.	1	2	3	4	5

**5 Did you find this visit to the Fort educational?**

*(Please circle one number.)*

1 Yes

2 No

**6 Did you feel that you had enough time at the Fort?**

*(Please circle one number.)*

1 Yes

2 No



(If "No") How much more time did you want?

1 Another half an hour

2 Another hour

3 More than another hour

**7 Overall, how much did you enjoy your visit to Fort Sumter today?**

*(Please circle one number.)*

1 A great deal

4 A little

2 A lot

5 Not at all

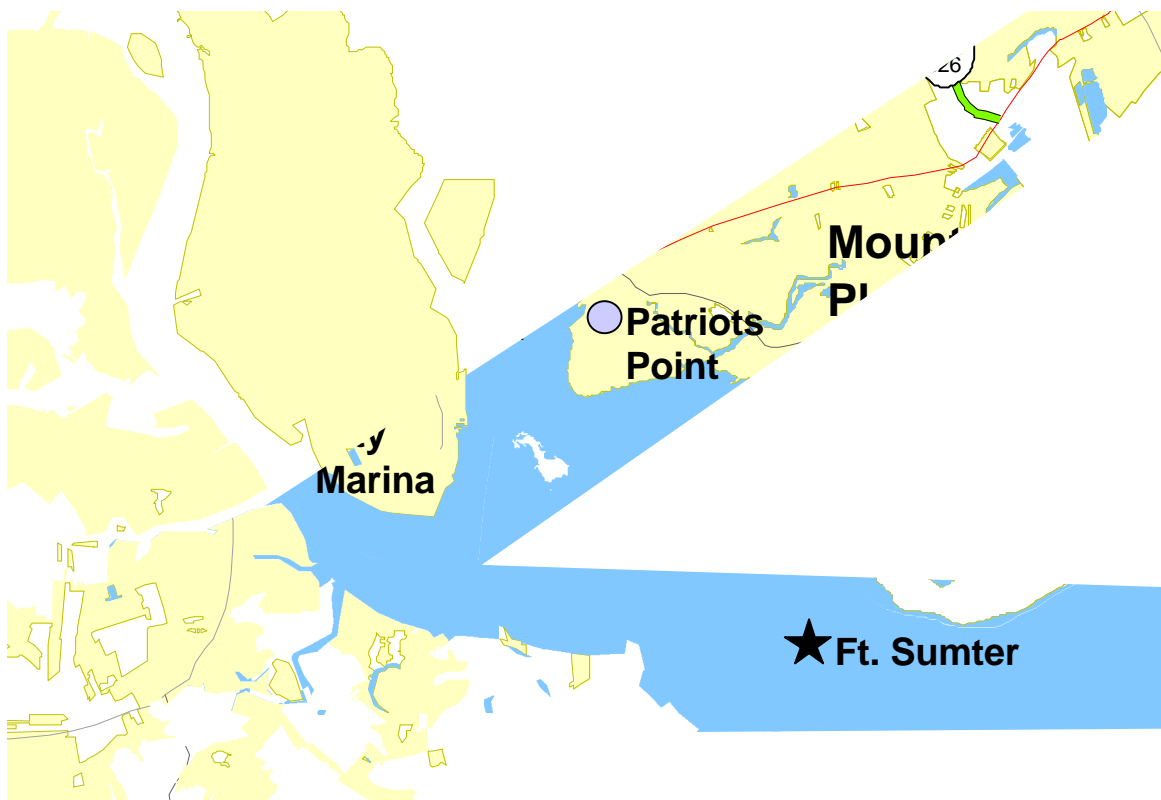
3 Somewhat

## POTENTIAL MANAGEMENT OPTIONS FOR FORT SUMTER

The Park Superintendent is always interested in learning about ways to improve services at Fort Sumter.

There are two options under consideration for departure points to Fort Sumter. These options are different in several ways.

On the next few pages we will ask you about which options you like better and why. To help you think about the options, the map below shows where the different sites are located.



	Option A	Option B
a Amount of time spent at the Fort.	Stay at the Fort for one hour.	Option to stay at the Fort longer than one hour.
b Park rangers available to answer questions and give historical talks.	Available only at the Fort.	Available while waiting for the boat, on the boat, and at the Fort.
c Displays and exhibits about Fort Sumter while waiting for the boat.	At Patriot's Point: displays about Civil War on outside building wall. City Marina: no exhibits.	National Park museum about Fort Sumter at departure site. Also, displays in nearby park along walkways.
d Admission to the exhibits.	At Patriot's Point: free admission to displays. City Marina: no exhibits.	Free admission to museum.
e Seating while waiting for the boat.	At Patriot's Point: seating in shaded open air food service area. City Marina: no sheltered area.	Seating in air conditioned museum and shaded outside seating.
f Parking near the departure point.	Free parking in a lot at Patriot's Point. Street parking near the City Marina.	Paid parking in garages across the street from the departure point.
g Number of times per day that a boat leaves for the Fort.	3 times per day (one boat every 2 1/2 hours) from each departure point.	On average 6 times per day (about one every hour).
h Fort Sumter departure point location(s)	Two departure points- Patriot's Point (in Mount Pleasant) and the City Marina (in Charleston).	One departure point- beside the S.C. Aquarium in Charleston.

**1** Above are two options for boat departure points to Fort Sumter, Option A and Option B. The differences between the two options are described for each. Considering all of these factors which option do you prefer?  
(Please circle one number.)

1 Option A

2 Option B

**2. If the Superintendent decided on Option B, would you still have visited the Fort on this trip to Charleston?**  
(Please circle one number.)

1 Yes

2 No

**3 There are many reasons for your choice of Option A or Option B. Which three are the most important to you?** (Please circle the three numbers that apply.)

1 Fort Sumter departure point location(s).

2 Number of times per day that a boat leaves for the Fort.

3 Cost of parking at the departure point.

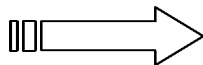
4 Sheltered areas with seating where visitors can wait for the boat.

5 Park rangers available to answer questions and give historical talks.

6 Displays and exhibits to see while waiting for the boat.

7 Flexibility in time spent at the Fort.

8 Don't have to drive into downtown Charleston.




**Next Page**



## LODGING IN THE CHARLESTON AREA

### 1 Are you staying overnight in the Charleston area?

*(Please circle one number.)*

1 Yes  (If "Yes") How many nights will you stay?  
Number of nights: \_\_\_\_\_

2 No (If "No") Please skip to the next section, "Visitor Information".

### 2 What is the main type of lodging you are using in the Charleston area on this trip?

*(Please circle one number.)*

- |                            |                        |
|----------------------------|------------------------|
| 1 Hotel                    | 5 Friends or relatives |
| 2 Bed and Breakfast or Inn | 6 Campground           |
| 3 Motel                    | 7 Other: _____         |
| 4 Beach house or Condo     |                        |

### 3 Where are you mainly staying on this trip?

*(Please circle one number.)*

- |                       |                 |
|-----------------------|-----------------|
| 1 Downtown Charleston | 4 Isle of Palms |
| 2 North Charleston    | 5 West Ashley   |
| 3 Mt. Pleasant        | 6 Other: _____  |

**4 Why did you pick this part of Charleston to stay in?**

*(Please circle all that apply.)*

- |                                    |                                    |
|------------------------------------|------------------------------------|
| 1 Easy to get to historic district | 6 Near friends or relatives        |
| 2 Easy to get to Fort Sumter       | 7 Near to special events           |
| 3 Easy to get to beaches           | 8 Easy to get to other attractions |
| 4 Near the airport                 | 9 Other: _____                     |
| 5 Near shopping                    |                                    |

**5 Which of the following factors influenced your choice of lodgings?**

*(Please circle all that apply.)*

- |   |  |
|---|--|
| 1 Cost  | 6 Availability of rooms                          |
| 2 It is part of a national hotel or motel chain.                    | 7 Amenities (e.g., transportation service, pool) |
| 3 Unique or quaint lodging  | 8 Availability of parking                        |
| 4 Familiarity with accommodations                                   | 9 Part of a vacation package                     |
| 5 Promotions, awards, &/or perks (e.g., frequent flyer miles, etc.) | 10 Other: _____                                  |

- 6 The park management is considering establishing water taxi service between Patriot's Point (in Mount Pleasant) and the S.C. Aquarium (in downtown Charleston). The taxi service would run every 30 minutes and cost \$2 one way. How likely would you be to use this service to get around the Charleston area?**  
*(Please circle one number.)*

- |                                     |                                    |
|-------------------------------------|------------------------------------|
| 1 I would not use the taxi.         | 4 I definitely would use the taxi. |
| 2 I might use the taxi.             | 5 I am really not sure.            |
| 3 I most likely would use the taxi. |                                    |

## **VISITOR INFORMATION**

- 1 a. If you are a U.S. resident, what is the zip code of your permanent address?** U.S. zip code: \_\_\_\_\_
- b. If you are not a U.S. resident, in what country do you live?** Name of country: \_\_\_\_\_

- 2 Are you:**                      1      Female                      2      Male

- 3 Which best describes your racial or ethnic background?**  
*(Please circle all that apply.)*

- |                             |                             |
|-----------------------------|-----------------------------|
| 1 White                     | 4 American Indian           |
| 2 Black or African American | 5 Asian or Pacific Islander |
| 3 Latino or Hispanic        | 6 Other: _____              |

**4 What is your age group?**  
(Please circle one number.)

- |                    |                     |
|--------------------|---------------------|
| 1 Ages 21 to 24    | 4 Ages 50 to 64     |
| 2 Ages 25 to 34    | 5 Ages 65 and older |
| 3 Ages of 35 to 49 |                     |

**5 What is the highest level of education you have completed?**  
(Please circle one number.)

- |                               |                              |
|-------------------------------|------------------------------|
| 1 Less than High School       | 5 Technical or Trade School  |
| 2 Some High School            | 6 College Graduate           |
| 3 High School Graduate or GED | 7 Graduate School or Masters |
| 4 Some College                | 8 Advanced Degree            |

**6 Which best describes your current employment status?**  
(Please circle one number.)

- |                       |                          |
|-----------------------|--------------------------|
| 1 Employed full-time  | 4 Retired                |
| 2 Employed part-time  | 5 Student                |
| 3 Full-time homemaker | 6 Temporarily unemployed |

**7 How many people are in your household  
(including yourself)?**

Number of people: \_\_\_\_\_

**8 What was your total household income (before taxes) in 1999?**  
(Please circle one number.)

1 less than \$15,000

6 \$50,000 to \$74,999

2 \$15,000 to \$19,999

7 \$75,000 to \$99,999

3 \$20,000 to \$29,999

8 \$100,000 to \$149,000

4 \$30,000 to \$39,999

9 \$150,000 or more

5 \$40,000 to \$49,999

# **SURVEY OF CHARLESTON AREA VISITORS**

**Thank you very much for taking a few minutes to complete this survey concerning your visit to the Charleston area! Your answers are entirely confidential. Please answer every question. Thank you!**

## TOURIST ACTIVITIES

**1 Is this your first visit to the Charleston area?**

*(Please circle one number.)*

1 Yes

2 No

**2 Which of the following best describes the main purpose of your visit to the Charleston area?**

*(Please circle one number.)*

1 Visit family or friends

5 Attend special event(s)

2 Sightseeing

6 Vacation

3 Visit beaches

7 Learn about history

4 Business

8 Other: \_\_\_\_\_

**3 Which of the following attractions have you visited or do you plan to visit on this trip to the Charleston area?**

*(Please circle all that apply.)*

1 Charleston Historic District

6 Fort Sumter

2 Charleston Museum

7 Patriot's Point/Naval Museum

3 City Market

8 Fort Moultrie

4 Area beaches

9 Charles Pinckney Historic Site

5 Plantations (e.g., Magnolia Gardens, Drayton Hall)

10 Other: \_\_\_\_\_

**4 Are you traveling as part of an organized tour group?**  
(Please circle one number.)

1 Yes

2 No

**5 How many people are in your party (including yourself)?**

1 Number *under* 18 years of age: \_\_\_\_\_

2 Number *over* 18 years of age: \_\_\_\_\_

## **S.C. AQUARIUM- YOUR VISIT**

**1 Which statement best describes your visit to the S.C. Aquarium?**  
(Please circle one number.)

1 It was a primary destination.

3 It was one of many destinations.

2 It was one of a few major destinations.

4 It was an unplanned visit.

**2 When did you consider visiting the S.C. Aquarium?**  
(Please circle one number.)

1 Before coming on this trip to the Charleston area.

2 After arriving in the Charleston area.

**3 How long do you plan to sight-see *today*?**

Time you started sight-seeing today: \_\_\_\_\_


Time you plan to end your sight-seeing today: \_\_\_\_\_

**4 Is this visit to the S.C. Aquarium the *only* activity that you have planned for today?**



*(Please circle one number.)*

1 Yes

2 No  (If "No") What other activities do you have planned for **today**? *(Please circle all that apply.)*

1 Walking around Charleston

7 Fort Sumter

2 Charleston Historic District

8 Fort Moultrie

3 City Market

9 Patriot's Point/Naval Museum

4 Charleston Museum

10 See the plantations

5 Shopping


11 Charles Pinckney Historic Site


6 Area beaches

12 Other: \_\_\_\_\_

**5 Did you drive to the S.C. Aquarium today?**

*(Please circle one number.)*

1 No  (If "No") How did you get to the aquarium? \_\_\_\_\_

2 Yes  (If "Yes") Which route did you use to arrive at the aquarium?  
*(Please circle one number.)*

1 I-26 to Meeting St.

4 Rt. 17 North to Calhoun St.

2 Rt. 17 South to Meeting St.

5 Other: \_\_\_\_\_

3 James Island Connector to  
Calhoun St.

**6 How helpful were the following in directing you to the S.C. Aquarium today?**


*(Please circle one number for each.)*

	Poor	Fair	Good	Excellent	No Opinion
a. Directional signs from the interstate to local streets.	1	2	3	4	5
b. Aquarium trailblazers along local streets.	1	2	3	4	5
c. Aquarium banners along local streets.	1	2	3	4	5
d. Directional signs from local streets to the aquarium's parking areas.	1	2	3	4	5
e. Directional signs from the garage to the aquarium.	1	2	3	4	5

**7 Would additional signs have made it easier for you to find the S.C. Aquarium today?**

*(Please circle one number.)*

1 No

2 Yes  (If "Yes") Which of the following would have helped?  
*(Please circle all that apply.)*

1 More directional signs along the highway

2 More directional signs along local Charleston streets

3 More trailblazers around Charleston

*Please indicate where:* \_\_\_\_\_

**8 How convenient was parking near the S.C. Aquarium?**

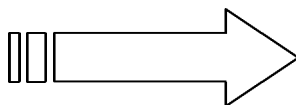
*(Please circle one number.)*

- 1 Very convenient
- 2 Somewhat convenient
- 3 Not convenient at all
- 4 No opinion

**9 How does the cost of parking at the S.C. Aquarium compare to other sites or locations you have visited in the Charleston area?**

*(Please circle one number.)*

- 1 Costs *less* than other sites
- 2 Costs *about the same* as other sites
- 3 Costs *more* than other sites
- 4 No opinion



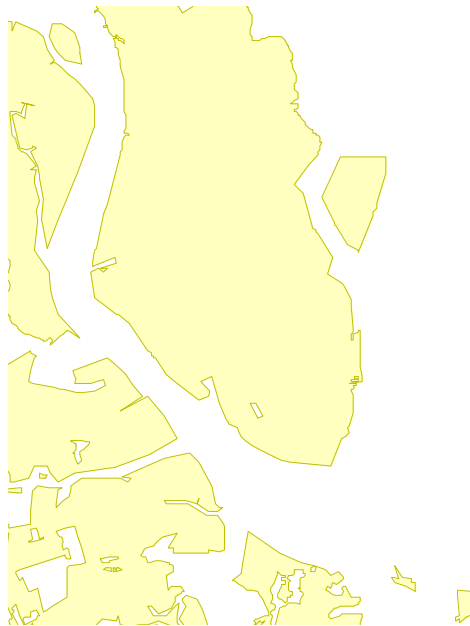
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## **NEW VISITOR CENTER FOR FORT SUMTER**

**The National Park Service is constructing a new Fort Sumter visitors center. This center will be located next to the S.C. Aquarium in Charleston. Once this facility is complete, all boat rides to Fort Sumter will leave from this location. Currently, boats to the Fort leave from Patriot's Point (in Mount Pleasant) and the City Marina (in Charleston).**

**This facility will include an air-conditioned museum and access to the Fort via boat. The visitors center will be free to the public, and the cost of the boat ride to the Fort will be about \$10. The boat trip will take about 40 minutes.**

**On the next few pages we will ask you a few questions about possibly visiting the Fort. To help you think about the questions, the map below shows where the different sites are located.**



**1 On this trip to Charleston, have you visited Fort Sumter, or do you plan to visit the Fort?**

*(Please circle one number.)*

1 No

2 Yes



(If "Yes") From which location did you or do you plan to leave?

1 Patriot's Point in Mount Pleasant

2 City Marina in Charleston

**2. If the new visitors center facility were open and available to you on this trip to Charleston, which of the following would you do on this trip?**

*(Please circle one number.)*

1 Visited the new Fort Sumter visitors center

2 Ridden the boat to see Fort Sumter

3 Both

4 None of the above

## **LODGING IN THE CHARLESTON AREA**

**1 Are you staying overnight in the Charleston area?**

*(Please circle one number.)*

1 Yes



(If "Yes") How many nights will you stay?

Number of nights: \_\_\_\_\_

2 No

(If "No") Please skip to the next section, "Visitor Information".

**2 What is the main type of lodging you are using in the Charleston area on this trip?**

*(Please circle one number.)*

- |                            |                        |
|----------------------------|------------------------|
| 1 Hotel                    | 5 Friends or relatives |
| 2 Bed and Breakfast or Inn | 6 Campground           |
| 3 Motel                    | 7 Other: _____         |
| 4 Beach house or Condo     |                        |

**3 Where are you mainly staying on this trip?**

*(Please circle one number.)*

- |                       |                 |
|-----------------------|-----------------|
| 1 Downtown Charleston | 4 Isle of Palms |
| 2 North Charleston    | 5 West Ashley   |
| 3 Mt. Pleasant        | 6 Other: _____  |

**4 Why did you pick this part of Charleston to stay in?**

*(Please circle all that apply.)*

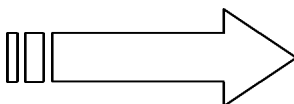
- |                                    |                                |
|------------------------------------|--------------------------------|
| 1 Easy to get to historic district | 6 Easy to get to S.C. Aquarium |
| 2 Easy to get to beaches           | 7 Near to special events       |
| 3 Easy to get to other attractions | 8 Near the airport             |
| 4 Near friends or relatives        | 9 Other: _____                 |
| 5 Near shopping                    |                                |

**5 Which of the following factors influenced your choice of lodgings?**  
(Please circle all that apply.)

- |   |  |
|---|--|
| 1 Cost  | 6 Availability of rooms                          |
| 2 Part of a national hotel or motel chain                           | 7 Amenities (e.g., transportation service, pool) |
| 3 Unique or quaint lodging  | 8 Availability of parking                        |
| 4 Familiarity with accommodations                                   | 9 Part of a vacation package                     |
| 5 Promotions, awards, &/or perks (e.g., frequent flyer miles, etc.) | 10 Other:_____                                   |

**6 The park management is considering establishing water taxi service between Patriot's Point (in Mount Pleasant) and the S.C. Aquarium (in downtown Charleston). The taxi service would run every 30 minutes and cost \$2 one way. How likely would you be to use this service to get around the Charleston area?**  
(Please circle one number.)

- |                                     |                                    |
|-------------------------------------|------------------------------------|
| 1 I would not use the taxi.         | 4 I definitely would use the taxi. |
| 2 I might use the taxi.             | 5 I am really not sure.            |
| 3 I most likely would use the taxi. |                                    |



Next Page

## VISITOR INFORMATION

- 1 a. If you are a U.S. resident, what is the zip code of your permanent address?**

U.S. zip code: \_\_\_\_\_

- b. If you are not a U.S. resident, in what country do you live?**

Name of country: \_\_\_\_\_

- 2 Are you:**                      1      Female                      2      Male

- 3 Which best describes your racial or ethnic background?**

*(Please circle all that apply.)*

1 White

4 American Indian

2 Black or African American

5 Asian or Pacific Islander

3 Latino or Hispanic

6 Other: \_\_\_\_\_

- 4 What is your age group?**

*(Please circle one number.)*

1 Ages 21 to 24

4 Ages 50 to 64

2 Ages 25 to 34

5 Ages 65 and older

3 Ages of 35 to 49



**5 What is the highest level of education you have completed?**

*(Please circle one number.)*

- |                               |                              |
|-------------------------------|------------------------------|
| 1 Less than High School       | 5 Technical or Trade School  |
| 2 Some High School            | 6 College Graduate           |
| 3 High School Graduate or GED | 7 Graduate School or Masters |
| 4 Some College                | 8 Advanced Degree            |

**6 Which best describes your current employment status?**

*(Please circle one number.)*

- |                       |                          |
|-----------------------|--------------------------|
| 1 Employed full-time  | 4 Retired                |
| 2 Employed part-time  | 5 Student                |
| 3 Full-time homemaker | 6 Temporarily unemployed |

**7 How many people are in your household  
(including yourself)?**

Number of people: \_\_\_\_\_

**8 What was your total household income (before taxes) in 1999?**

*(Please circle one number.)*

- |                        |                          |
|------------------------|--------------------------|
| 1 less than \$15,000   | 6 \$50,000 to \$74,999   |
| 2 \$15,000 to \$19,999 | 7 \$75,000 to \$99,999   |
| 3 \$20,000 to \$29,999 | 8 \$100,000 to \$149,000 |
| 4 \$30,000 to \$39,999 | 9 \$150,000 or more      |
| 5 \$40,000 to \$49,999 |                          |

# **SURVEY OF CHARLESTON-AREA RESIDENTS**

**Thank you very much for taking a few minutes to complete this survey! Your answers are entirely confidential. Please answer every question. Thank you!**

## **TODAY'S ACTIVITIES**

**1 Are you showing friends or family who are not from the area around Charleston today?**

*(Please circle one number.)*

1 No

2 Yes  (If "Yes") How long do you plan to sight-see **today**?

Time you started sight-seeing today: \_\_\_\_\_

Time you plan to end your sight-seeing today: \_\_\_\_\_

**2 How many people are in your party (including yourself)?**

1 Number *under* 18 years of age: \_\_\_\_\_

2 Number *over* 18 years of age: \_\_\_\_\_

**3 Is this your first visit to the S.C. Aquarium?**


*(Please circle one number.)*

1 Yes

2 No

**4 Is this visit to the S.C. Aquarium the *only* activity that you have planned for today?**  
(Please circle one number.)

1 Yes

2 No  (If "No") What other activities do you have planned for **today**? (Please circle all that apply.)

1 Walking around Charleston

6 Fort Sumter

2 Charleston Historic District

7 Patriot's Point/Naval Museum

3 City Market

8 See the plantations


4 Shopping


9 Charles Pinckney Historic Site

5 Area beaches

10 Other: \_\_\_\_\_

**5 Did you drive to the S.C. Aquarium today?**  
(Please circle one number.)

1 No  (If "No") How did you get to the aquarium? \_\_\_\_\_

2 Yes  (If "Yes") Which route did you use to arrive at the aquarium?  
(Please circle one number.)

1 I-26 to Meeting St.

4 Rt. 17 North to Calhoun St.

2 Rt. 17 South to Meeting St.

5 Other: \_\_\_\_\_

3 James Island Connector to  
Calhoun St.

**6 How convenient was parking near the S.C. Aquarium?**

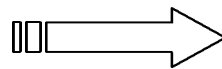
*(Please circle one number.)*

- 1 Very convenient
- 2 Somewhat convenient
- 3 Not convenient at all
- 4 No opinion

**7 How does the cost of parking at the S.C. Aquarium compare to other sites or locations in the Charleston area?**

*(Please circle one number.)*

- 1 Costs *less* than other sites.
- 2 Costs *about the same* as other sites.
- 3 Costs *more* than other sites.
- 4 No opinion



Next Page

## NEW VISITOR CENTER FOR FORT SUMTER

The National Park Service is constructing a new Fort Sumter visitors center. This center will be located next to the S.C. Aquarium in Charleston. Once this facility is complete, all boat rides to Fort Sumter will leave from this location. Currently, boats to the Fort leave from Patriot's Point (in Mount Pleasant) and the City Marina (in Charleston).

This facility will include an air-conditioned museum and access to the Fort via boat. The visitors center will be free to the public, and the cost of the boat ride to the Fort will be about \$10. The boat trip will take about 40 minutes.

On the next few pages we will ask you a few questions about visiting the Fort. To help you think about the questions, the map below shows where the different sites are located.



**1 Have you visited Fort Sumter?**

*(Please circle one number.)*

1 Yes

2 No

**2. Do you recommend going to Fort Sumter to people visiting the Charleston area?**

*(Please circle one number.)*

1 Yes

2 No

**3. If the new visitors center facility were open and available, which of the following would you suggest to people visiting the Charleston area?**

*(Please circle one number.)*

1 Visit the new Fort Sumter visitors center

3 Both

2 Ride the boat to see Fort Sumter

4 None of the above

**4 The park management is considering establishing water taxi service between Patriot's Point (in Mount Pleasant) and the S.C. Aquarium (in downtown Charleston). The taxi service would run every 30 minutes and cost \$2 one way. How likely would you be to use this service to get around the Charleston area?**

*(Please circle one number.)*

1 I would not use the taxi.

4 I definitely would use the taxi.

2 I might use the taxi.

5 I am really not sure.

3 I most likely would use the taxi.

## VISITOR INFORMATION

**1 What is the zip code of your permanent address?** \_\_\_\_\_

**2 Are you:**                      1        Female                                      2        Male

**3 Which best describes your racial or ethnic background?**

*(Please circle all that apply.)*

1 White

4 American Indian

2 Black or African American

5 Asian or Pacific Islander

3 Latino or Hispanic

6 Other: \_\_\_\_\_

**4 What is your age group?**

*(Please circle one number.)*

1 Ages 21 to 24

4 Ages 50 to 64

2 Ages 25 to 34

5 Ages 65 and older

3 Ages of 35 to 49

**5 What is the highest level of education you have completed?**

*(Please circle one number.)*

1 Less than High School

5 Technical or Trade School

2 Some High School

6 College Graduate

3 High School Graduate or GED

7 Graduate School or Masters

4 Some College

8 Advanced Degree



**6 Which best describes your current employment status?**

*(Please circle one number.)*

- |                       |                          |
|-----------------------|--------------------------|
| 1 Employed full-time  | 4 Retired                |
| 2 Employed part-time  | 5 Student                |
| 3 Full-time homemaker | 6 Temporarily unemployed |

**7 How many people are in your household  
(including yourself)?**

Number of people: \_\_\_\_\_

**8 What was your total household income (before taxes) in 1999?**

*(Please circle one number.)*

- |                        |                          |
|------------------------|--------------------------|
| 1 less than \$15,000   | 6 \$50,000 to \$74,999   |
| 2 \$15,000 to \$19,999 | 7 \$75,000 to \$99,999   |
| 3 \$20,000 to \$29,999 | 8 \$100,000 to \$149,000 |
| 4 \$30,000 to \$39,999 | 9 \$150,000 or more      |
| 5 \$40,000 to \$49,999 |                          |